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AUTHOR	Beitler, Michael A.
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ABSTRACT

Contract learning is an invaluable tool in organizational learning and management development. A contract can incorporate teacher-directed learning (TDL) and self-directed learning (SDL), as appropriate. Substantial research has revealed the power of SDL; the trick is to harness this learning for the benefit of the organization. The literature on organizational learning speaks of individuals learning new knowledge, skills, and attitudes for the benefit of the organization. Many authors have abandoned the term organizational learning for the idea of a "learning organization" (LO). The environment for successful SDL and the environment for a flourishing LO share characteristics that emphasize participation, employer support, and collaboration. Creation of a LO environment that encourages SDL clearly enhances efforts at management development. Three types of skills are necessary for success as an executive or manager. TDL appears to be appropriate in acquiring technical skills; SDL is appropriate in acquisition of people and conceptual skills. A contract among the supervisor, manager/learner, and human resource development representative can incorporate TDL and SDL, as appropriate. These contracts provide guidance for the individual manager and a way to capture, document, and share knowledge throughout the organization. (Contains 20 references.) (YLB)

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CONTRACT LEARNING IN ORGANIZATIONAL LEARNING & MANAGEMENT DEVELOPMENT

Michael A. Beitler

Contract learning was advocated throughout the 1970s and 1980s by Knowles (1975, 1986). Knowles, who taught graduate students at Boston University and North Carolina State University, found lecturing to *older* students ineffective because of their unique backgrounds and needs. Knowles decided to write a learning contract with each of his students. The contract was an agreement between teacher and student; it detailed what would be learned, and how it would be learned (Knowles, 1986). Knowles' conception of the learning contract has been implemented in numerous graduate schools; including Norwich University and The Union Institute. Many graduate students have reported great success with contract learning (Beitler, 1998).

Throughout the 1990s, I have advocated the use of contract learning with mid-career professionals (Beitler, 1999a, 1999b). While I have been a vocal advocate of contract learning, I have always kept Knowles' ominous warning in mind. Knowles (1986) warned, "some people get so enamored of one technique that they use it in every situation, whether it is appropriate or not" (p.3). To heed his admonition, I have attempted to determine when contract learning is appropriate (or not appropriate) in management development.

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SELF–DIRECTED LEARNING (SDL)

Over the past twenty years, a substantial amount of research has revealed the power of self-directed learning (SDL)—where adult learners are empowered by the opportunity of studying what is important to them. The trick is to harness this empowered learning for the benefit of the entire organization.

Tough (1979) believed self-directed learning (SDL) was powerful because the learners themselves made decisions about what to learn, how to learn it, and at what pace the learning should proceed. While these self-directed learners sought information and advice from others, the responsibility for and control over the learning remained theirs.

Knowles (1975, 1980) focused on the importance of establishing a climate supporting SDL. Spear and Mocker (1983) claimed the environment has a significant influence on the type of SDL projects undertaken. Confessore and Kops (1998) believe "the organization's goals, values, and work environment affect the degree to which SDL will take place within the organization" (p.371).

SDL IN THE WORKPLACE

Nobody denies that self-directed learning takes place in organizations. Long and Morris (1995) found more than fifty articles and papers published between 1983 and 1993 concerning SDL in business and industry.

Foucher's (1995) interviews with HR practitioners revealed four organizational variables that promote SDL in the workplace:

1. the presence of a participative management style;
2. a supportive environment in which employees enjoy
3. support for experimentation and tolerance for error; and
4. support for unplanned, non-sequential learning activities.

Foucher's (1995) work corroborates Baskett's (1993) findings in his study of workplace learning. Baskett found the following factors important in enhancing organizational learning:

1. employees can contribute to the organization's goals and values,
2. an environment of trust and mutual respect,
3. support for risk taking and innovation, and
4. collaboration among organization members.

ORGANIZATIONAL LEARNING TO LEARNING ORGANIZATIONS

The literature on organizational learning speaks of individuals learning new KSAs (knowledge, skills, and attitudes) for the benefit of the organization. It is important to analyze the learning needs of both the individual and the organization. The new individual KSAs must be available for the benefit of the organization. Confessore and Kops (1998) stated, "the learning organization must account for the learning needs of both the individual and the organization" (p.371).

Confessore and Kops (1998) believe, "all the perspectives used to describe organizational learning include some dimension of transforming individual knowledge into collective knowledge—that is, knowledge determined, shared, interpreted, and used collectively throughout the organization" (p.366). Dixon (1994) defined organizational learning as a process by which information, determined by the organization as meaningful, is communicated by and throughout the organization.

In the 1990s, many authors abandoned the term "organizational learning" for the idea of a "learning organization." Writers, including Senge (1990), emphasized the importance of a systemic approach to learning in the organization.

Watkins and Marsick (1993) defined six imperatives for a learning organization:

1. creating continuous learning opportunities,
2. promoting inquiry and dialogue,
3. encouraging collaboration and team learning,

4. establishing systems to capture and share learning,
5. empowering people to have a collective vision, and
6. connecting the organization to the environment.

SDL & LEARNING ORGANIZATIONS

The environment for successful SDL and the environment for a flourishing learning organization share the same characteristics. Confessore and Kops (1998) found five characteristics reflected in both bodies of literature:

1. tolerance for errors, support for experimentation and risk taking, and an emphasis on creativity and innovation;
2. the use of a participative leadership style and delegation of responsibility to organizational members;
3. support for learning initiatives that are linked to the organization's goals and values;
4. encouragement of open communication and of information systems that provide for collaboration and teamwork, and the use of both internal and external learning resources; and,
5. provision of opportunities and situations for individual learning.

MANAGEMENT DEVELOPMENT

The creation of a learning organization environment, which encourages self-direct and self-initiated learning, clearly enhances our efforts at management development.

An essential aspect of management development in any organization is the acquisition and use of self-directed learning skills. Kops (1993, 1997) interviewed mid-level managers and found five conditions that affected their ability to learn:

1. supportive and challenging organizational settings, characterized by open communication, active experimentation, and tolerance of mistakes;
2. clear expectations and outcomes that allow for the alignment of SDL efforts with the goals of the organization;
3. discretionary time for learning and maintenance of resources that support learning;
4. opportunities for making internal and external contacts, and for building networks with colleagues and associates; and,
5. development of employees' ability to engage in SDL.

McCall, Lombardo, and Morrison (1989) found independent learning to be a key aspect in executive development. Vaill (1996) stated that leaders must model self-directed learning behavior, and require it of others.

MY FINDINGS

In previous publications (1997, 1998, 1999b), I shared my findings from interviews with mid-career executives and professionals. Understandably, they showed little interest in debating the merits of teacher-directed versus self-directed learning. The mid-career learners I interviewed were very pragmatic. Their criterion for evaluating a learning scenario was based on one question: "Did I learn anything?"

The adult learners in my research expressed satisfaction with both teacher-directed and self-directed learning—seemingly diametrically opposed methodologies. Only after a second round of interviews did I begin to understand what they were telling me. In my second interviews, I asked questions about course content and the related teaching/learning methodology (teacher-directed versus self-directed learning). The appropriateness of teacher-directed or self-directed learning became obvious when related to course content. I then developed the following Continuum of Business Education (Table 11.1):

Table 11.1. The Continuum of Business Education

Teacher-Directed (Training)		Learner-Directed (Development)
Technical Skills	People Skills	Conceptual Skills
Courses	Courses	Courses
accounting	group dynamics	strategy
finance	organizational behavior	ethics

Source: Beitler, M.A. (1999b).

TEACHING/LEARNING METHODOLOGIES

In American business schools, and in corporate HRD departments, we talk about the importance of executives and managers acquiring three types of skills: technical skills, people skills, and conceptual skills. All three types of skills are necessary for success as an executive or manager.

Technical skills, including accounting and finance, involve acquisition of a "block of knowledge." This well-defined "block" includes the principles and fundamentals that provide a basic understanding of these fields. The non-accountant/non-financial professional is blissfully unaware of what they don't know. In these areas teacher-direction is a necessity. Classroom training is appropriate because all the participants need the same minimal block of knowledge.

People skills (such as group dynamics) and conceptual skills (such as corporate strategy) do not involve clearly defined disciplines. In fact, people skills and conceptual skills are interdisciplinary in nature. In these areas, professionals have a better sense of what they don't know. Individuals know if they are weak in communication skills, team-building skills, task prioritizing, strategic planning, or stakeholder management skills. If they haven't figured it out on their own, they should have been made aware of it through their organization's evaluation system (whether 360 degree or supervisor).

Learner-direction or learner-participation is very powerful in the acquisition of people skills and conceptual skills. In these two areas, no two managers have the same needs. A customized, or individualized, plan is appropriate.

Teacher-directed learning appears to be appropriate in acquiring the technical skills of accounting or finance; whereas, learner-directed learning (SDL) is appropriate in the acquisition of people skills and conceptual skills.

HARNESSING INDIVIDUAL LEARNING IN THE ORGANIZATION

While I can argue for the use of both teacher-directed learning and self-directed learning in the organization, it is more important to discuss how to harness individual learning for the benefit of the entire organization.

That brings us back to considering contract learning. A contract between the supervisor, the individual manager/learner, and an HRD representative can incorporate teacher-directed and self-directed learning, as appropriate.

These contracts not only provide guidance for the individual manager; they provide a way to capture, document, and share knowledge throughout the organization. These contracts can provide the foundation for a learning organization in which individuals engage in self-directed study and participate in discussions with fellow managers. These group discussions enhance the critical thinking skills of the individual, and add to the knowledge base of the organization.

Contract learning is an invaluable tool in organizational learning and management development. Contract learning, along with group discussions, offers exciting possibilities for developing the organization and the individual manager.

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